

# JUDICIAL COUNCIL TASK FORCE ON SELF-REPRESENTED LITIGANTS ACTION PLAN

## **RECOMMENDATION I: SELF-HELP CENTERS**

**IN ORDER TO EXPEDITE THE PROCESSING OF CASES INVOLVING SELF-REPRESENTED LITIGANTS, AND INCREASE ACCESS TO JUSTICE FOR THE PUBLIC, COURT-BASED SELF-HELP CENTERS SHOULD BE DEVELOPED THROUGHOUT THE STATE.**

### **THE TASK FORCE RECOMMENDS THAT:**

#### **Strategies:**

- |             |   |
|-------------|---|
| <b>IA.</b>  | <p><b>THE JUDICIAL COUNCIL INCLUDE SELF-HELP SERVICES AS A CORE COURT FUNCTION IN THE TRIAL COURT BUDGET PROCESS.</b></p> <ol style="list-style-type: none"> <li>1. Effective management of cases involving self-represented litigants directly affects the ability of the courts to achieve their missions, and appropriate funding should be budgeted.</li> <li>2. Judicial Council budget request forms should reflect these services as a core court process.</li> </ol>  |
| <b>I.B.</b> | <p><b>COURTS UTILIZE COURT-BASED, ATTORNEY-SUPERVISED, STAFFED SELF-HELP CENTERS AS THE OPTIMUM WAY TO FACILITATE THE EFFICIENT PROCESSING OF CASES INVOLVING SELF-REPRESENTED LITIGANTS AND TO INCREASE ACCESS TO JUSTICE FOR THE PUBLIC.</b></p> <ol style="list-style-type: none"> <li>1. Methods of service delivery may vary according to the needs of the individual and the legal complexities of the case.</li> <li>2. For cases in which self-study methods are sufficient, written materials, forms with instructions, Web site information, videos, and other materials should be made available.</li> <li>3. Personal contact with self-help center staff by telephone, workshop, or individual assistance is frequently the most helpful method of service.</li> <li>4. Sufficient support staff should be provided to self-help center attorneys through possible redeployment of existing court staff.</li> <li>5. Services may be provided at the court, in community centers, mobile vans, libraries, jails, or other community locations.</li> <li>6. Some individuals can only gain meaningful access to the court with full-service legal representation. To meet that need:               <ul style="list-style-type: none"> <li>○ Self-help centers should work with certified lawyer referral services, and</li> <li>○ Local courts should promote pro bono representation with recognition programs or other incentives for attorneys.</li> </ul> </li> </ol> |
| <b>I.C.</b> | <p><b>SELF-HELP CENTERS CONDUCT INITIAL ASSESSMENT OF A LITIGANT'S NEEDS (TRIAGE) TO SAVE VALUABLE COURT TIME AND ALLOW FOR THE MOST PRUDENT ALLOCATION OF RESOURCES.</b></p> <ol style="list-style-type: none"> <li>1. When an individual first arrives at the courthouse seeking help, a qualified member of the self-help center staff should conduct a brief needs assessment and direct the person appropriately.</li> <li>2. The self-help centers should be encouraged to work with legal aid organizations that can provide full representation as well as with certified lawyer referral and information services, and should encourage the development of panels of attorneys providing unbundled services.</li> <li>3. Early intervention by self-help center staff to assist with the correct completion of paperwork, explain procedural requirements, and provide basic information about court processes can save time for the court clerks, as well as courtroom staff, and can avoid unnecessary continuances.</li> </ol>  |

## **Recommendation I. Self-Help Centers – continued**

### **Strategies – continued**

<b>I.D.</b>	<p><b>COURT-BASED SELF-HELP CENTERS SERVE AS FOCAL POINTS FOR COUNTYWIDE OR REGIONAL PROGRAMS, IN COLLABORATION WITH LEGAL SERVICES, LOCAL BAR ASSOCIATIONS AND OTHER COMMUNITY STAKEHOLDERS, FOR ASSISTING SELF-REPRESENTED LITIGANTS.</b></p> <ol style="list-style-type: none"><li>1. Partnerships with organizations such as nonprofit legal services; bar associations; public institutions; law libraries, public libraries, professional associations for psychologists, accountants, and process servers; and other appropriate organizations should be continued and encouraged.</li><li>2. Aggressive networking and collaborative efforts can maximize resources in numerous ways, such as<ul style="list-style-type: none"><li>○ Providing facilities for workshops</li><li>○ Providing mediation</li><li>○ Providing assistance at law libraries</li><li>○ Providing volunteer accounting or psychological assistance in appropriate cases</li></ul></li><li>3. Collaborative efforts can also provide volunteer staffing resources such as<ul style="list-style-type: none"><li>○ Local attorneys, attorneys emeritus and retired judicial officers for the self-help centers</li><li>○ Law student interns</li><li>○ Other student volunteers</li></ul></li><li>4. The Judicial Council should continue to support ongoing community-focused strategic planning.</li></ol>
<b>I.E.</b>	<p><b>SELF-HELP CENTERS PROVIDE ONGOING ASSISTANCE THROUGHOUT THE ENTIRE COURT PROCESS, INCLUDING COLLECTION AND ENFORCEMENT OF JUDGMENTS AND ORDERS.</b></p> <ol style="list-style-type: none"><li>1. Existing self-help resources should be coordinated to incorporate programs such as the family law facilitator, small claims advisor, court-based legal services, and other programs into centers where both family and civil law information is provided.</li><li>2. Self-help centers should be encouraged to include an array of services designed to assist the public and the court in the processing of cases involving self-represented litigants. Examples of these services include the following:<ul style="list-style-type: none"><li>○ Positioning of staff in the courtrooms to prepare orders, assist in reaching agreements, or answer questions;</li><li>○ Conducting mediation and other settlement processes;</li><li>○ Conducting status conferences and providing assistance with orders and judgments;</li><li>○ Assisting in coordination of related cases and in development of optimal court operations</li><li>○ Serving as a resource for judicial officers and court staff on legal and procedural issues affecting self-represented litigants.</li><li>○ Offering litigants procedural information about enforcement of orders and judgments;</li><li>○ Providing information to assist litigants comply with court-ordered services;</li><li>○ Serving as a single point of contact for community-based organizations and volunteers at the court; and</li><li>○ Making information available about the appellate process.</li></ul></li></ol>

## **RECOMMENDATION II: SUPPORT FOR SELF-HELP SERVICES**

**A SYSTEM OF SUPPORT SHOULD BE DEVELOPED AT THE STATE LEVEL TO PROMOTE AND ASSIST IN THE CREATION, IMPLEMENTATION, AND OPERATION OF THE SELF-HELP CENTERS AND TO INCREASE THE EFFICIENT PROCESSING OF CASES INVOLVING SELF-REPRESENTED LITIGANTS.**

### **THE TASK FORCE RECOMMENDS THAT:**

#### **Strategies:**

<b>II.A.</b>	<b>THE ADMINISTRATIVE OFFICE OF THE COURTS (AOC) MAINTAIN A RESOURCE LIBRARY WITH MATERIALS FOR USE BY SELF-HELP CENTERS IN THE LOCAL COURTS.</b> <ol style="list-style-type: none"><li>1. Materials that have been developed and designed to assist self-represented litigants with obtaining and enforcing court orders should be collected and maintained. Examples include:<ul style="list-style-type: none"><li>○ Web site designs, videos, brochures, translations, and informational packets.</li><li>○ Administrative materials include such as partnership agreements, MOUs, and volunteer training guides.</li><li>○ Detailed information on self-represented litigants efforts that have been recognized with California courts or other awards.</li></ul></li></ol>
<b>II.B.</b>	<b>THE AOC PROVIDE TECHNICAL ASSISTANCE TO COURTS ON IMPLEMENTATION STRATEGIES.</b> <ol style="list-style-type: none"><li>1. Regional conferences, training sessions and online meetings.</li><li>2. AOC to have knowledgeable staff available to provide legal subject matter and operations assistance to local courts.</li></ol>
<b>II.C</b>	<b>THE AOC GATHER AND EVALUATE INFORMATION ABOUT THE FEASIBILITY OF IMPLEMENTING A TELEPHONE HELP-LINE SERVICE TO SUPPORT THE LOCAL SELF-HELP CENTERS WITH ACCESS TO AOC ATTORNEYS.</b> <ol style="list-style-type: none"><li>1. AOC attorneys to serve as a resource for local programs.</li><li>2. Experts in legal and procedural subject matter and court operations should be available.</li><li>3. Bilingual staff should be available.</li></ol>
<b>II.D.</b>	<b>THE AOC SERVE AS A CENTRAL CLEARINGHOUSE FOR TRANSLATIONS AND OTHER MATERIALS IN A VARIETY OF LANGUAGES.</b> <ol style="list-style-type: none"><li>1. Create model protocols based on success of self-help centers that provide services in languages in addition to English.</li><li>2. Create clearinghouse for translations and other materials.</li></ol>
<b>II.E.</b>	<b>THE AOC EXPAND THE CALIFORNIA COURTS ONLINE SELF-HELP CENTER</b> <ol style="list-style-type: none"><li>1. Provide additional material in different languages.</li><li>2. Add short videos in English and Spanish to explain concepts such as service of process and courtroom presentations.</li><li>3. Create interactive features and step-by-step guides.</li><li>4. Continue to add additional information.</li></ol>

## Recommendation II - Self-Help Center Support System

### Strategies – continued

<b>II.F.</b>	<b>THE JUDICIAL COUNCIL CONTINUE TO SIMPLIFY ITS FORMS AND INSTRUCTIONS.</b> <ol style="list-style-type: none"> <li>1. Expand translation of forms and instructions into “plain language.”</li> <li>2. Continue to work on simplification of forms and instructions.</li> <li>3. Continue efforts to translate forms and instructions into more languages.</li> <li>4. Develop forms for use with unbundled legal services.</li> <li>5. Explore computerized forms that can create case-specific documents and to meet the needs of persons with different disabilities.</li> </ol>
<b>II.G.</b>	<b>THE AOC CONTINUE TO PROVIDE TECHNICAL TRAINING AND ASSIST LOCAL COURTS IN THE DEVELOPMENT AND IMPLEMENTATION OF SELF-HELP TECHNOLOGY ON COUNTYWIDE OR REGIONAL BASES.</b> <ol style="list-style-type: none"> <li>1. AOC to provide training to self-help centers on the use of technology and how to guide self-represented litigants to internet resources.</li> <li>2. AOC to assist in development of self-represented litigant technology, such as <ul style="list-style-type: none"> <li>o Interactive forms programs &amp; programs to help litigants develop agreements</li> <li>o Local Web site enhancement</li> <li>o Videoconferencing for workshops, meetings, and court appearances</li> <li>o Telephone help-lines &amp; direct telephone lines to legal and social service resources in the community</li> <li>o Programs for clerks to draft orders after hearing in the courtrooms</li> <li>o Audiotapes in English and other languages with information on forms preparation, procedures, and the courtroom</li> </ul> </li> </ol>
<b>II.H.</b>	<b>THE JUDICIAL COUNCIL CONTINUE TO SUPPORT INCREASED AVAILABILITY OF REPRESENTATION FOR LOW- AND MODERATE-INCOME INDIVIDUALS.</b> <ol style="list-style-type: none"> <li>1. Support the pursuit of limited scope (unbundled) legal representation by <ul style="list-style-type: none"> <li>o Training judicial officers and court staff and collaboration with State Bar for attorney training</li> </ul> </li> <li>2. Support partnerships between judicial branch and nonprofit legal services organizations, the State Bar of California and local bar associations, the California Commission on Access to Justice, and the Legal Services Trust Fund Commission to increase funding for legal services.</li> <li>3. Advise judicial officers of ways in which they can join with the Chief Justice in increasing pro bono work and other legal services consistent with the Code of Judicial Ethics.</li> </ol>
<b>II.I.</b>	<b>THE JUDICIAL COUNCIL CONTINUE TO WORK WITH THE STATE BAR IN PROMOTING ACCESS FOR SELF-REPRESENTED LITIGANTS.</b> <ol style="list-style-type: none"> <li>1. Coordination in developing resources.</li> <li>2. Recognition with honors and awards for efforts to assist self-represented litigants.</li> </ol>
<b>II.J.</b>	<b>THE AOC PROVIDE TECHNICAL ASSISTANCE RELATED TO SELF-REPRESENTED LITIGANTS TO COURTS THAT ARE DEVELOPING COLLABORATIVE JUSTICE STRATEGIES.</b> <ol style="list-style-type: none"> <li>1. Unified Courts for Families</li> <li>2. Family drug courts</li> <li>3. Domestic violence courts</li> </ol>

### **RECOMMENDATION III: ALLOCATION OF EXISTING RESOURCES**

**PRESIDING JUDGES AND COURT EXECUTIVES SHOULD CONSIDER THE NEEDS OF SELF-REPRESENTED LITIGANTS IN ALLOCATING EXISTING JUDICIAL AND STAFF RESOURCES.**

#### **THE TASK FORCE RECOMMENDS THAT:**

##### **Strategies:**

<b>III.A.</b>	<b>JUDICIAL OFFICERS HANDLING LARGE NUMBERS OF CASES INVOLVING SELF-REPRESENTED LITIGANTS BE GIVEN HIGH PRIORITY FOR ALLOCATION OF SUPPORT SERVICES SUCH AS RESEARCH ATTORNEYS.</b> <ol style="list-style-type: none"><li>1. Encourage assignment of experienced, talented and energetic judicial officers with comprehensive knowledge of the substantive law to departments with high numbers of self-represented litigants, such as family law, small claims, traffic, or unlawful detainer.</li><li>2. Provide judicial officers in assignment with large pro per populations research attorney support.</li><li>3. Make sufficient courtroom assistance by self-help center attorney available to judicial officers and pro pers.</li><li>4. Provide sufficient courtroom staff to allow for efficient flow of calendars.</li></ol>
<b>III.B.</b>	<b>COURTS CONTINUE, OR IMPLEMENT, A SELF-REPRESENTED LITIGANT PLANNING PROCESS THAT INCLUDES BOTH COURT AND COMMUNITY STAKEHOLDERS, AND WORKS TOWARD ONGOING COORDINATION OF EFFORTS.</b> <ol style="list-style-type: none"><li>1. Working groups that have been formed for action planning for self-represented litigants locally should be ongoing and active.</li><li>2. Monthly meetings of local stakeholders.</li><li>3. Participants might include the court, legal services, other governmental agencies, local bars and legal services law libraries, public libraries, law schools, community colleges, other schools, community social service providers and a wide variety of other appropriate community based groups.</li></ol>

## **RECOMMENDATION IV: JUDICIAL BRANCH EDUCATION**

**IN ORDER TO INCREASE THE EFFICIENCY OF THE COURT AND TO MINIMIZE UNWARRANTED OBSTACLES ENCOUNTERED BY SELF-REPRESENTED LITIGANTS, A JUDICIAL BRANCH EDUCATION PROGRAM SPECIFICALLY DESIGNED TO ADDRESS ISSUES INVOLVING SELF-REPRESENTED LITIGANTS SHOULD BE IMPLEMENTED.**

### **THE TASK FORCE RECOMMENDS THAT:**

#### **Strategies:**

<b>IV.A.</b>	<b>A FORMAL CURRICULUM AND EDUCATION PROGRAM BE DEVELOPED TO ASSIST JUDICIAL OFFICERS AND OTHER COURT STAFF IN DEALING WITH THE POPULATION OF LITIGANTS WHO NAVIGATE THE COURT WITHOUT THE BENEFIT OF COUNSEL</b> <ol style="list-style-type: none"><li>1. Follow the model of curriculum development recently implemented to accommodate the needs of children in the courtroom as a model for assisting courtroom participants while maintaining neutrality.</li><li>2. Subject matters should include the following:<ul style="list-style-type: none"><li>• Ethical constraints when dealing with pro pers</li><li>• Working with self-help center staff to promote efficiency in the courtroom</li><li>• Plain-English language skills</li><li>• Use of nonverbal communication</li><li>• Cultural competence</li><li>• Community outreach and education</li></ul></li><li>3. Education should be provided for temporary judges and other court staff.</li></ol>
<b>IV.B.</b>	<b>THE AOC PROVIDE SPECIALIZED EDUCATION TO COURT CLERKS TO PROMOTE THEIR ABILITY TO PROVIDE THE PUBLIC HIGH-QUALITY INFORMATION AND APPROPRIATE REFERRALS, AS WELL AS TO SERVE AS SUPPORT STAFF TO THE SELF-HELP CENTERS.</b> <p>Subject matters should include the following:</p> <ul style="list-style-type: none"><li>• The difference between legal advice and legal information</li><li>• Working with self-help center staff to provide effective service to the public</li><li>• Training on community services available to self-represented litigants</li><li>• Uniform procedures for handling fee waiver requests</li><li>• A basic overview of substantive and procedural issues relevant to self-represented litigants</li><li>• Self-help Web site information available to court staff</li><li>• Creation of perception of fairness and equal treatment of all court users</li><li>• Effective skills in dealing with people in crisis</li><li>• Cultural competence</li><li>• Use of simple and ordinary English language skills when explaining legal procedures</li></ul>

## **RECOMMENDATION V: PUBLIC AND INTERGOVERNMENTAL EDUCATION AND OUTREACH**

**JUDICIAL OFFICERS AND OTHER APPROPRIATE COURT STAFF SHOULD ENGAGE IN COMMUNITY OUTREACH AND EDUCATION PROGRAMS DESIGNED TO FOSTER REALISTIC EXPECTATIONS ABOUT HOW THE COURTS WORK.**

### **THE TASK FORCE RECOMMENDS THAT:**

#### **Strategies:**

- |             |   |
|-------------|---|
| <b>V.A.</b> | <b>THE AOC CONTINUE TO DEVELOP INFORMATIONAL MATERIAL AND EXPLORE MODELS TO EXPLAIN THE JUDICIAL SYSTEM TO THE PUBLIC.</b> <ol style="list-style-type: none"><li>1. Judicial officers should be encouraged to engage in community outreach and education programs.</li><li>2. Existing communication modes should be employed to better inform Californians about their courts.</li><li>3. Videotapes on a variety of legal issues should be prepared for use by public access television, self-help centers, law libraries, and other information outlets.</li><li>4. Information should be developed to alert immigrant populations to the most commonly encountered differences between California's laws and those in their countries of origin.</li><li>5. A law-related educational Web site should be developed for grade school, middle school, and high school students.</li></ol> |
| <b>V.B.</b> | <b>EFFORTS TO DISSEMINATE INFORMATION TO LEGISLATORS ABOUT SERVICES AVAILABLE TO AND ISSUES RAISED BY SELF-REPRESENTED LITIGANTS BE INCREASED.</b> <ol style="list-style-type: none"><li>1. Materials should be developed to more fully inform local and state legislators of the issues raised by self-represented litigants.</li><li>2. Implement a "Legislator's Day" in the self-help centers and provide referral materials, testimonials, and research demonstrating benefits to legislators who receive complaints related to access to the courts.</li></ol>  |
| <b>V.C.</b> | <b>LOCAL COURTS PROVIDE LAW ENFORCEMENT, LOCAL BAR ASSOCIATIONS, LAW LIBRARIES, LOCAL DOMESTIC VIOLENCE COUNCILS, AND APPROPRIATE COMMUNITY GROUPS WITH INFORMATION ON ISSUES AND SERVICES RELATED TO SELF-REPRESENTED LITIGANTS</b> <ol style="list-style-type: none"><li>1. Provide training on enforcement of custody/visitation and restraining orders.</li><li>2. Provide information about the ways in which such orders are modified.</li><li>3. Courts should solicit regular input from law enforcement about problems they are having with the enforcement of court orders.</li><li>4. Provide legal services, local bars and other community organizations about services for and matters affecting self-represented litigants.</li><li>5. Collaborate with these stakeholders in cross-trainings.</li></ol>   |
| <b>V.D.</b> | <b>THE JUDICIAL COUNCIL CONTINUE TO COORDINATE WITH THE STATE BAR OF CALIFORNIA, THE LEGAL AID ASSOCIATION OF CALIFORNIA, THE CALIFORNIA COMMISSION ON ACCESS TO JUSTICE AND OTHER STATEWIDE ENTITIES ON PUBLIC OUTREACH EFFORTS.</b> <p>Examples include:</p> <ol style="list-style-type: none"><li>1. Public outreach efforts to increase utilization of self-help websites and other technological resources.</li><li>2. Cosponsoring conferences and workshops.</li></ol>   |

## **RECOMMENDATION VI: FACILITIES**

**SPACE IN COURT FACILITIES SHOULD BE MADE AVAILABLE TO PROMOTE OPTIMAL MANAGEMENT OF CASES INVOLVING SELF-REPRESENTED LITIGANTS, AND ALLOW FOR EFFECTIVE PROVISION OF SELF-HELP SERVICES TO THE PUBLIC.**

### **THE TASK FORCE RECOMMENDS THAT:**

#### **Strategies:**

<b>VI.A.</b>	<b>THE COURT FACILITIES PLAN DEVELOPED BY THE AOC INCLUDE SPACE FOR SELF-HELP CENTERS IN DESIGNS FOR FUTURE COURT FACILITIES, OR REMODELING OF EXISTING FACILITIES.</b> <ol style="list-style-type: none"><li>1. Space for workshops, mediations, and a place where self-represented litigants can sit and work on their paperwork at the court.</li><li>2. Use of copiers, computers and other technology in the self-help centers.</li><li>3. Self-help services that are as close to the counter clerk's office as possible.</li><li>4. An access checklist developed for court personnel that enables them to see the courthouse through the eyes of a first-time user. The tool should consider signage, self-help center location, and other issues self-represented litigants face in navigating the court.</li><li>5. Identification of courtrooms (numbering, etc.) that is focused on helping the public easily find the correct location.</li></ol>
<b>VI.B.</b>	<b>FACILITIES INCLUDE SUFFICIENT SPACE FOR LITIGANTS TO WAIT WHILE CONDUCTING BUSINESS AT THE COURT.</b> <ol style="list-style-type: none"><li>1. Sufficient space should be available while waiting at the court.</li><li>2. Helpful written information, pamphlets, flowcharts can be available to help litigants be better prepared when their turn arrives.</li></ol>
<b>VI.C.</b>	<b>THERE BE SUFFICIENT SPACE AT OR AROUND COURTROOMS TO WAIT FOR CASES TO BE CALLED, TO MEET WITH VOLUNTEER ATTORNEYS, TO CONDUCT SETTLEMENT TALKS, AND TO MEET WITH MEDIATORS AND SOCIAL SERVICES PROVIDERS.</b> <ol style="list-style-type: none"><li>1. Courtroom to have sufficient seating space.</li><li>2. Safe spaces should be provided for domestic violence cases.</li><li>3. Space around courtrooms for conferences with volunteer attorneys, self-help staff, mediators or other social service providers.</li></ol>
<b>VI.D.</b>	<b>FACILITIES INCLUDE CHILDREN'S WAITING AREAS FOR LITIGANTS WHO ARE AT THE COURT FOR HEARINGS OR TO PREPARE AND FILE PAPERWORK.</b> <ol style="list-style-type: none"><li>1. Supervised children's waiting areas should be available for members of the public who are attending court hearings.</li><li>2. Also for parents or guardians attending family court services mediations or utilizing self-help center services or other court services.</li></ol>
<b>VI.E.</b>	<b>INFORMATION STATIONS THAT CAN PROVIDE GENERAL INFORMATION ABOUT COURT FACILITIES AND SERVICES BE PLACED NEAR COURT ENTRANCES.</b> <ol style="list-style-type: none"><li>1. General information about how to find and use court services should be provided.</li></ol>
<b>VI.F.</b>	<b>COURTS PROVIDE MAPS AND SIGNAGE IN SEVERAL LANGUAGES TO ASSIST SELF-REPRESENTED LITIGANTS IN NAVIGATING THE COURT.</b> <ol style="list-style-type: none"><li>1. Include general information about courthouse use.</li><li>2. Signs and information should be translated into several languages &amp; universal signs developed.</li></ol>



## **RECOMMENDATION VII: FISCAL IMPACT**

**IN ADDRESSING THE CRITICAL NEED OF COURTS TO EFFECTIVELY MANAGE CASES INVOLVING SELF-REPRESENTED LITIGANTS AND TO PROVIDE MAXIMUM ACCESS TO JUSTICE FOR THE PUBLIC, CONTINUED EXPLORATION AND PURSUIT OF STABLE FUNDING STRATEGIES IS REQUIRED.**

### **THE TASK FORCE RECOMMENDS THAT:**

#### **Strategies:**

<b>VII.A.</b>	<b>CONTINUED STABLE FUNDING BE SOUGHT TO EXPAND SUCCESSFUL PILOT PROGRAMS STATEWIDE.</b> <ol style="list-style-type: none"><li>1. Family law facilitators</li><li>2. Family law information centers</li><li>3. Pilot self-help programs</li><li>4. Unified Courts for Families</li><li>5. Equal access funds for partnership grant programs</li></ol>
<b>VII.B.</b>	<b>THE AOC IDENTIFY, COLLECT AND REPORT ON DATA THAT SUPPORT DEVELOPMENT OF CONTINUED AND FUTURE FUNDING FOR PROGRAMS FOR SELF-REPRESENTED LITIGANTS.</b> <ol style="list-style-type: none"><li>1. Uniform statistical reporting from the local self-help centers should be implemented.</li><li>2. Survey local and state legislators about the number of constituent contacts they receive from pro per litigants requesting help.</li><li>3. Collect and compile state and local demographics on poverty and income levels.</li><li>4. Survey community organizations serving the homeless and other disadvantaged groups to identify need for legal assistance.</li><li>5. Judicial Branch Statistical Information System (JBSIS) should include information on whether or not litigants are represented by counsel in all categories of cases. The information should be collected and reported by the AOC.</li></ol>
<b>VII.C.</b>	<b>STANDARDIZED METHODOLOGIES TO MEASURE AND REPORT THE IMPACT OF SELF-HELP EFFORTS CONTINUE TO BE DEVELOPED.</b> <ol style="list-style-type: none"><li>1. Uniform definitions of terms should be established to allow for valid comparisons.</li><li>2. Standardized exit or customer satisfaction surveys should be implemented.</li><li>3. Other evaluation tools should be designed and implemented to test quality of service as well as volume.</li><li>4. Design methods to assess the success of the self-help centers in expediting the processing of pro per cases that will include<ul style="list-style-type: none"><li>○ Surveys of judicial officers</li><li>○ Surveys of court staff</li><li>○ Court operations data</li></ul></li></ol>

## Recommendation VI: Fiscal Impact

### Strategies – continued

<b>VII.E.</b>	<b>UNIFORM STANDARDS FOR SELF-HELP CENTERS BE ESTABLISHED.</b> Criteria for a self-help center must include the following: <ul style="list-style-type: none"> <li>○ Minimum staffing levels,</li> <li>○ Facilities requirements, and</li> <li>○ Operating hours.</li> </ul>
<b>VII.F.</b>	<b>THE FEASIBILITY OF ADDITIONAL REVENUE GENERATING TECHNIQUES, SUCH AS FEES FOR SELECTED SERVICES BY SELF-HELP CENTERS, BE EXPLORED IF APPROPRIATE.</b> <ol style="list-style-type: none"> <li>1. Investigate the possibility of fees for some types of self-help services.</li> <li>2. Must not cost more to administer than the funds that are generated.</li> <li>3. Must not suggest that an attorney-client relationship is being formed.</li> <li>4. Must not restrict access to courts.</li> </ol>
<b>VII.G.</b>	<b>EFFORTS OF THE COURTS TO SEEK SUPPLEMENTAL PUBLIC FUNDING FROM LOCAL BOARDS OF SUPERVISORS AND OTHER SUCH SOURCES TO SUPPORT LOCAL SELF-HELP CENTERS BE SUPPORTED AND ENCOURAGED.</b> <ol style="list-style-type: none"> <li>1. Replicate the success of those counties where the board of supervisors has funded legal self-help centers administered by the courts.</li> </ol>
<b>VII.H.</b>	<b>COURT-BASED FEES BE USED FOR COURT-BASED SELF-HELP SERVICES.</b> <ol style="list-style-type: none"> <li>1. Small claims advisor fees</li> <li>2. Dispute Resolution Program Act (DPRA) funds</li> </ol>
<b>VII.I.</b>	<b>AOC ASSISTANCE WITH GRANT APPLICATIONS AND OTHER RESOURCE ENHANCING MECHANISMS CONTINUE TO BE OFFERED TO LOCAL COURTS.</b> <ol style="list-style-type: none"> <li>1. Help with grant writing and with applications for other grant funding.</li> <li>2. Provide advice on ethical issues in grant application and administration.</li> <li>3. Offer centralized purchasing options to enhance buying power.</li> </ol>

### **RECOMMENDATION VIII: IMPLEMENTATION OF STATEWIDE ACTION PLAN**

**TO PROVIDE FOR SUCCESSFUL IMPLEMENTATION OF THIS STATEWIDE ACTION PLAN, A SMALLER TASK FORCE CHARGED WITH THE RESPONSIBILITY OF OVERSEEING IMPLEMENTATION SHOULD BE ESTABLISHED.**

#### **THE TASK FORCE RECOMMENDS THAT:**

##### **Strategies:**

<b>VIII.A.</b>	<b>THE IMPLEMENTATION TASK FORCE BE COMPOSED OF EXPERTS IN THE AREAS OF JUDICIAL EDUCATION, COURT FACILITIES, LEGISLATION, JUDICIAL FINANCE AND BUDGETING, COURT ADMINISTRATION AND OPERATIONS, AND COURT-OPERATED SELF-HELP SERVICES.</b> <ul style="list-style-type: none"><li>1. Development and implementation of programs that:<ul style="list-style-type: none"><li>a) Promote expeditious processing of cases involving self-represented litigants.</li><li>b) Provide assistance to self-represented litigants that facilitates that process.</li></ul></li></ul>
<b>VIII.B.</b>	<b>THE IMPLEMENTATION TASK FORCE HAVE REPRESENTATION FROM EXISTING JUDICIAL COUNCIL ADVISORY COMMITTEES.</b> <ul style="list-style-type: none"><li>1. Presiding Judges and Court Executives</li><li>2. Appellate</li><li>3. Family and Juvenile</li><li>4. Civil and Small Claims</li><li>5. Court Interpreters</li><li>6. Traffic</li><li>7. Probate</li><li>8. Budget</li><li>9. Facilities</li><li>10. Technology</li></ul>